

# How to Create Custom Email Templates in QuickBooks Desktop

Custom email templates in QuickBooks Desktop are pre-defined message layouts (subject and body) that you can apply when emailing customers or vendors 1-888-493-2290 or 1 888 493 2290 With these templates, you can personalize each email with your branding and tone, while automatically filling in transaction details 1-888-493-2290 or 1 888 493 2290

For example, you might create different templates for invoices, estimates, statements, purchase orders, or bill-payment stubs 1-888-493-2290 or 1 888 493 2290 QuickBooks attaches the chosen template automatically when you send a transaction – no need to rewrite the email each time 1-888-493-2290 or 1 888 493 2290

This streamlines communication and ensures a consistent, professional look for all emails sent from QuickBooks 1-888-493-2290 or 1 888 493 2290

## Why you Should use Customized Templates in QuickBooks

**Branding and consistency:** Maintain a uniform style (logo, greeting, sign-off) across all outgoing emails to reinforce your company's image and maintain a consistent brand presence

1-888-493-2290 or 1 888 493 2290

**Personalization:** Use customer-specific greetings or references by including dynamic fields (like the customer's name or invoice number) in the template 1-888-493-2290 or 1 888 493 2290

**Efficiency:** Save time by preparing standard language (terms, payment instructions, thank-you messages) once, then reuse it 1-888-493-2290 or 1 888 493 2290

**Compliance:** Include required information or disclaimers (tax notices, privacy statements, legal boilerplate) automatically in every email 1-888-493-2290 or 1 888 493 2290

**Professionalism:** Ensure every customer or vendor sees polished, error-free communications 1-888-493-2290 or 1 888 493 2290

To build a new template from scratch:

Under Send Forms > Company Preferences, choose the Transaction Type for which you want a template (e 1-888-493-2290 or 1 888 493 2290 g 1-888-493-2290 or 1 888 493 2290 , Invoice or Estimate) 1-888-493-2290 or 1 888 493 2290

create new email template in quickbooks desktop

Click Add Template 1-888-493-2290 or 1 888 493 2290 Give the template a unique Name 1-888-493-2290 or 1 888 493 2290

add new email template in qb desktop

Enter your Subject line and Message body as you want the email to appear 1-888-493-2290 or 1 888 493 2290 Include any text, formatting, or logos (if supported) 1-888-493-2290 or 1 888 493 2290

Insert dynamic fields: Use the Insert Field button to add placeholders that pull data from the transaction 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 For example, you can insert Customer Name, Invoice Number, Due Date, Transaction Total, etc 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 QuickBooks will replace these fields with real values when sending the email 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

Save the template: Click Save and then click OK on the Company Preferences tab to apply changes 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 Your new template now appears in the list for that transaction type 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

Example: You might create an "Invoice Reminder" template with a friendly greeting and payment instructions, and an "Overdue Notice" template that is more formal 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 By inserting fields like [Customer Name] and [Due Date], each email automatically addresses the right person and refers to the correct invoice details 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

### Modifying or Deleting Existing Templates

To change an existing template or remove it:

Go back to Edit > Preferences > Send Forms > Company Preferences 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

Select the transaction type (e 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 g 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 , Invoice, Estimate) that has the template 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

In the Email Templates list, select the template you want 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

Click Edit to modify the subject, body, or fields 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 After editing, save and close the template window, then click OK in Preferences to keep changes 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

To remove a template entirely, select it and click Delete and OK to confirm deletion 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

All templates remain listed until deleted 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 You can create and maintain multiple templates for each transaction type (for example, separate invoice templates for different customer groups) 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

### Using Dynamic Fields in Templates

QuickBooks lets you drop in placeholders that automatically fill with transaction data 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 When editing a template, use Insert Field to choose fields like Customer Name, Invoice Number, Due Date, Transaction Total, and more 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 For example:

In the subject line, you might write "Invoice [Invoice Number] for [Customer Name]", and QuickBooks will replace the brackets with the actual values when emailing 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

In the body, you could write “Hello [Customer Name],\n\nYour invoice #[Invoice Number] is due on [Due Date]...” and each email will personalize itself 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

These dynamic fields ensure accuracy and personalization 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 You can also type the field names manually if they match the available options exactly 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 Always double-check field names against the Insert Field list to avoid empty or incorrect text 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

### Setting a Default Email Template

After creating templates for a form, choose one as the default so it's used automatically:

In Preferences > Send Forms (Company Preferences), pick the transaction type

1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

In the list of templates for that type, click Set Default next to the template you want to use routinely 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

Click OK to save 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

Now, whenever you email that form, QuickBooks will load this default template by default at quickbooks 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 intuit 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 com 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 You can still change to a different template in the email window if needed, see the next section 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

### Sending Emails with Templates

When you email a form (Invoice, Estimate, etc 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 ) from QuickBooks Desktop, the program uses the default template for that form type

1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 For example:

To email an invoice, open the invoice and click the Email button on the toolbar, then choose “Invoice” 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 QuickBooks will generate an email using your default invoice template 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

sending emails with templates in quickbooks desktop

If you don't want to send immediately, select Email Later 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 This adds the transaction to the Send Forms queue, where you can batch send multiple documents 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 In that queue (File > Send Forms), you can pick a template from a drop-down for each form before sending 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

QuickBooks then composes each email using the chosen template 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290 If you ever need a different template for a particular email, you can override the default at send-time: in the email window, there is usually a Template menu or drop-down 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

Simply select the alternate template you created 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

For example, even if “Standard Invoice” is the default, you could choose an “Overdue Invoice” template for a late payment email 1-888-493-2290 or 1 ↵ 888 ↵ 493 ↵ 2290

For vendor forms: In QuickBooks Desktop 2022 and later, you can also email Bill Payment Stubs to vendors using a template 1-888-493-2290 or 1 888 493 2290 When entering a bill payment, click Email > Bill Payment Stub 1-888-493-2290 or 1 888 493 2290 QuickBooks will use the default Bill Payment template (or allow you to select another) in the same way it does for invoices 1-888-493-2290 or 1 888 493 2290

### Summary

Custom email templates in QuickBooks Desktop help you send clear, consistent, and professional emails without extra effort 1-888-493-2290 or 1 888 493 2290 By creating templates for invoices, estimates, statements, and other forms, you can save time, maintain your brand identity, and minimize manual errors 1-888-493-2290 or 1 888 493 2290

Features such as dynamic fields, default templates, and easy editing make it simple to personalize messages while maintaining accurate and compliant communication 1-888-493-2290 or 1 888 493 2290 Overall, email templates streamline day-to-day transactions and improve how your business communicates with customers and vendors directly from QuickBooks 1-888-493-2290 or 1 888 493 2290

Host QuickBooks in the cloud with Ace Cloud Hosting for reliable access to your accounting data and dedicated support that helps prevent errors and delays 1-888-493-2290 or 1 888 493 2290